

# Service-Based Lead Generation Plan Checklist

Print off this checklist and tick off each step as you go through the [‘Building a Lead Generation Plan for Your Service-Based Business’](#) guide on our Talk About Digital Podcast website.

## Define Your Lead Generation Objectives

- Set clear, measurable goals for lead generation (e.g., increase enquiries or bookings by X% in X months)
- Ensure your objectives are focused on leads, not immediate sales
- Write down your lead generation targets

## Identify Your Ideal Customer Profile (ICP)

- Define the characteristics of your ideal customer (e.g., demographics, needs, pain points)
- Document your target audience in detail
- Align your messaging and marketing efforts to attract this audience

## Outline Your Customer’s Decision Journey

- Map out the customer journey from awareness to conversion

- Identify key moments where lead generation is most effective
- Document the best opportunities for capturing leads at each stage

## **Choose Budget-Friendly Digital Marketing Channels**

- Prioritise cost-effective channels such as social media, Google My Business, and local SEO
- Document which digital channels will maximise your reach
- Choose channels that fit your budget and audience

## **Develop a Lead Capture Strategy**

- Plan how you will collect leads (e.g., booking forms, enquiry forms, phone calls)
- Set up free or low-cost tools to capture leads (e.g., CRM, Google Forms)
- Align your lead capture methods with your budget and resources

## **Create a Basic Content Strategy to Attract Leads**

- Plan content that resonates with your ideal customers (e.g., blogs, social media, videos)
- Document a simple content plan that drives leads

- Leverage testimonials and local SEO to maximise lead attraction without a large budget

## **Create Your Lead Nurturing Strategy**

- Define how you will keep prospective leads engaged (e.g., email, SMS, follow-ups)
- Document your lead nurturing plan using affordable tools
- Personalise engagement to build trust and increase conversions

## **Plan for Tracking and Measuring Success**

- Choose key metrics to track lead generation success (e.g., lead volume, conversion rates)
- Set up tools for measuring results (e.g., Google Analytics GA4, spreadsheets)
- Establish a review schedule to regularly evaluate and refine your strategy

## **Understanding Your Strategy: Bringing All the Pieces Together**

- Review each element of your lead generation strategy
- Ensure your goals, channels, content, and nurturing processes align for maximum impact

- Document the key elements of your strategy in a coherent plan

## **Piecing It All Together in One Lead Generation Strategy Plan Document**

- Structure your lead generation plan in a clear, actionable document
- Create a step-by-step plan that can be followed and adjusted over time
- Finalise your strategy with clear goals, timelines, and resources

## **Budgeting and Timeline for Implementation**

- Define a budget for each part of your plan, prioritising high-impact, low-cost activities
- Document a realistic timeline for executing your lead generation strategy
- Prioritise quick wins for immediate results while planning long-term growth

## **Reviewing and Adjusting Your Lead Generation Plan**

- Set up a regular schedule to review your strategy's performance
- Document what's working and what isn't in your plan



- Make simple adjustments for improvement without increasing your budget

By using this checklist and following the related guide on the TAD website you will understand how to understand how to research, plan and document a strategy plan for your small service-based business to grow the number of high-quality leads you receive each month.

If you found this checklist and guide helpful, subscribe to the Talk About Digital Podcast (available on our website and all major podcasting platforms) and give it a listen as we share even more actionable value in the form of the 'TAD Takeaway'.